

Overview of Compilation Options

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After creating a compilation (see article: [Create a Compilation](#)), the settings can be updated to reflect the requirements of your customer.

To edit a compilation, navigate to **Project Menu > Index Reports & Compilations**. Open the compilation editor by clicking on the name, or on the pencil icon in the "Tools" column.

The screenshot shows the 'Index Reports & Compilations' page for 'Valve Project (0005678)'. It features a 'Compilations List' table with columns: Tools, Name, Description, Statuses, CD Required, CD Number, and Type. A row for 'Databook' is shown with a status of '1 complete of 1002 cards'. A red arrow points to the pencil icon in the 'Tools' column, and another red arrow points to the 'Databook' name in the 'Name' column.

There are eight sections available for adjustment:

The screenshot shows the 'Edit Compilation' page for 'Pump Project (1234)'. The page is divided into eight numbered sections:

- 1. Compilation Info:** Fields for Name (Databook), Description, File Type (PDF), and Cover Pages (Ensure every doc has cover page). Includes checkboxes for 'Include Markups', 'Add Comment Page to Document(s)', and 'Regenerate ENTIRE Compilation during submittal process'.
- 2. Compilation Layout:** Select Compilation Layout (dropdown) and a 'Save As' button.
- 3. Compilation Sub-Packages:** Allow Sub-Packages per (dropdown) and Create Sub-Packages by (dropdown). Includes an 'Enable All Fields' checkbox.
- 4. CD Copy:** CD Required (checkbox) and CD Copies Number (0).
- 5. Pagination:** Page Number Position (dropdown) and Page Number Pattern (dropdown).
- 6. Templates:** Compilation Cover Page, Table of Contents, Section Title Page, Doc Code Title Page, and Sub-Package Title Page (all dropdowns).
- 7. Table of Contents and Bookmarks sections options:** Depth of TOC, Depth of TOC numbering, Hide first level TOC numbers, Bookmark pattern for cover page entry, Bookmark pattern for TOC entry, TOC/Bookmark pattern for cards, Suffix when files cannot be embedded in databook PDF, Append secondary codes, If card has secondary codes, Suppress cards in TOC, Show page numbers on the TOC, TOC/Bookmark pattern for doc code, Append Included In Codes to Primary Code, When Included In Codes are added to the compilation layout, When Not Applicable Codes are added to the compilation layout.
- 8. Compilation Structure Options:** Sort documents into section (radio buttons), On generation, do not include document files, Create structure only, Only display relevant equipment in lists, Show Not Applicable on Doc Code Title Page, Disable title page for Sub-Package, Disable title page for Doc Code, Allow Submittal Anytime, Allow TOC Submittal Anytime, If a section does not contain any cards, hide the section, If doc code does not contain any cards.

Buttons at the bottom include 'Download Compilation', 'Generate Compilation', 'Download Table of Contents', 'Generate Table of Contents', and 'Download Compilation Cover Page'.

1. Compilation Info

Compilation Info

1 Name:*

Databook

2 Description:

3 File Type:

PDF

4 Cover Pages:

a Ensure every doc has cover page

b ☒ Respect cover page suppression for each card

5 ☐ Include Markups

6 ☐ Add Comment Page to Document(s)

7 ☐ Regenerate ENTIRE Compilation during submittal process

1. **Name:** The name of the compilation.

2. **Description:** Additional information that has to be included about the compilation.

3. **File Type:** How the compilation downloads (as a .pdf file or a .zip with folders).

Note: If the compilation is set to download as a .zip, cover pages will be merged into PDFs and generated as separate files alongside non-PDF files.

4. **Cover Pages:** If/how cover pages are included in the compilation

a. Available options: "No Cover Pages", "Keep cover pages on returned docs only", or "Ensure every doc has cover page".

b. "Respect cover page suppression for each card" option will prevent a cover pages from being added to cards where "No stamp and no cover page" has been selected.

5. **Include Markups:** Option to include or exclude markups should they be included in the documents.

6. **Add Comments Page to Document(s):** Option to include or exclude comments pages in the compilation.

7. **Regenerate ENTIRE Compilation during submittal process:** Option to regenerate the compilation at the point of submittal. If disabled, the Compilation will need to be manually regenerated to ensure the latest version is submitted.

- For large projects, it is recommended that this option be disabled to avoid delays in the submittal process.

2. Compilation Layout

Compilation Layout

Select Compilation Layout:

- Select Compilation Layo

+ Save As

Option to select a predefined layout and/or save the current layouts for use on future compilations.

See the following articles for more information:

1. [Compilation Structure and Styling Presets](#)
2. [Create Reusable Compilation Layout](#)

3. Compilation Sub-Packages

Compilation Sub-Packages

Allow Sub-Packages per:

Compilation

Create Sub-Packages by:

Do not create Sub-Packages

Do not create Sub-Packages

Equipment Type

Item/Model

Line No. (ACME)

Line No. (Omega)

PO No. (ACME)

PO Rev No. (ACME)

Product Type

Sub-Supplier

Tag No.

Option to create sub-packages based on fields in the equipment list.

For more information, see this article: [Compilation Sub-Packages](#).

4. CD Copy

CD Copy

☐ CD Required

CD Copies Number:

Options available are used strictly in the pricing module (a feature that helps you charge customers for document services). This option allows you to set whether a CD is required, and how many copies are to be generated. For more information, see this article: [Prices and Estimates](#).

5. Pagination

Pagination

Page Number Position:

No Numbering

Page Number Pattern:

<PageNumber>

Option to include or exclude page numbers, set the location for where the number appears, and set the pattern for how the numbering appears.

6. Templates

Templates

Compilation Cover Page:

Default Compilation Cover Page (system)

Table of Contents:

Compilation Table of Contents Template (system)

Section Title Page:

Compilation Section Title Page (system)

Doc Code Title Page:

Compilation Doc Code Title Page (system)

Sub-Package Title Page:

Compilation Sub-Package Title Page (system)

Option to select pre-established cover/title pages and/or table of contents templates for use in the corresponding section(s) of the compilation.

There are five different templates used in compilations. For more information, see this article: [Compilation](#)

7. Table of Contents and Bookmarks sections options

Table of Contents and Bookmarks sections options

Depth of TOC:* Depth of Bookmarking:
Depth of TOC numbering: Start of TOC numbering:*
Hide first level TOC numbers ☐

[Need some help?](#)

Bookmark pattern for cover page entry:*
Bookmark pattern for TOC entry:*
TOC/Bookmark pattern for cards:*

Suffix when files cannot be embedded in databook PDF:
☐ Append secondary codes (if they exist) to each card with suffix:
☐ If card has secondary codes, replicate the card TOC entry under EVERY secondary code with suffix
☐ Suppress cards in TOC
☒ Show page numbers on the TOC

TOC/Bookmark pattern for doc code:*
☐ Append Included In Codes to Primary Code (if applicable) using suffix:
When Included In Codes are added to the compilation layout, add suffix to TOC/Code:
When Not Applicable Codes are added to the compilation layout, add suffix to TOC/Code:

Options for configuring and sorting the cards in the compilation, among other settings.

See the following articles for more information:

1. [Overview of Table of Contents Options](#)
2. [Table of Contents - Examples](#)
3. [Sort Cards in Compilation](#)

8. Compilation Structure Options

Compilation Structure Options

1 **Sort documents inside section:*** ☒ By pattern value ☐ Choose fields for sorting
2 ☐ On generation, do not include document files. Create structure only
3 ☐ Only display relevant equipment in lists
4 ☐ Show Not Applicable on Doc Code Title Page if no cards for a code
5 ☐ Disable title page for Sub-Package
6 ☐ Disable title page for Doc Code
7 ☐ Allow Submittal Anytime ?
8 ☒ Allow TOC Submittal Anytime ?
9 ☐ If a section does not contain any cards, hide the section
10 ☒ If doc code does not contain any cards: ☒ Hide code ☐ Include code with suffix

1. **Sort documents inside section:** Option to choose whether documents inside sections are sorted by pattern value (as defined in the "Table of Contents and Bookmarks sections options" section), or sorted as defined in this section:

Compilation Structure Options

Sort documents inside section:* ☐ By pattern value ☒ Choose fields for sorting

* available variables

2. **On generation, do not include document file. Create structure only:** Option to check if the compilation

structure is correct without including the files, saving you time when generating the compilation.

3. **Only display relevant equipment in lists:** Option to exclude tags which are not included in the cards of the compilation.

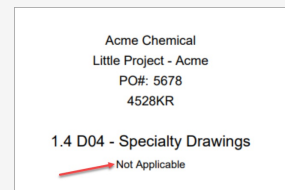
Example: Compilation level is set to "Order".

By default, all units are included based on the level even if the included cards do not reflect all units. If this option is selected, the compilation will only include units which are reflected in the associated cards.

4. **Show Not Applicable on Doc Code Title Page if no cards for a code:** Option to include cover pages in the compilation even if no files attached.

Example: Compilation level is set to "Shipment".

Shipment 1 includes "D04 - Specialty Drawings", but Shipment 2 does not. To keep the compilations consistent, the code should still appear even if there are no cards included in Shipment. With this option selected, a cover page will be added but will indicate "Not Applicable" on it.



5. **Disable title page for Sub-Package:** Option to include or exclude title pages for sub-packages.
6. **Disable title page for Doc Code:** Option to include or exclude title pages for doc codes (saving the need to manually disable for each code).
7. **Allow Submittal Anytime:** Option to allow or restrict submittal of the compilation before completion.
8. **Allow TOC Submittal Anytime:** Option to allow or restrict submittal of the Table of Contents before compilation completion.
9. **If a section does not contain any cards, hide the section:** Option to hide sections that do not contain any cards (commonly used with [compilation sub-packages](#)).
10. **If doc code does not contain any cards:** Option to either hide the doc code OR include a suffix for doc codes that do not contain any cards.



If you make any changes to the above selections, make sure to save by clicking the "Save Compilation (current compilation only)" button (top right of the page) **before** generating the Compilation.

Document Codes and Sections

For information about the Document Codes and Sections interface, see this article: [Create a Compilation](#)